SOUTH AFRICAN TOURISM
ORGANISATIONAL PERFORMANCE RESULTS
2015/16
Annexures

Portfolio Committee on Tourism
14 October 2016

SOUTH AFRICAN TOURISM

Annexure 1

Situation Analysis

SOUTH AFRICAN TOURISM

Global Tourism Performance in 2015

- International tourist arrivals grew by 4.4% in 2015, reaching more than a billion arrivals, according to the United Nations World Travel Organisation (UNWTO) World Tourism Barometer.

- Despite global economic challenges, international tourism results were well above expectations, with 50 million more overnight visitors travelling to destinations around the world in 2015 compared to 2014.

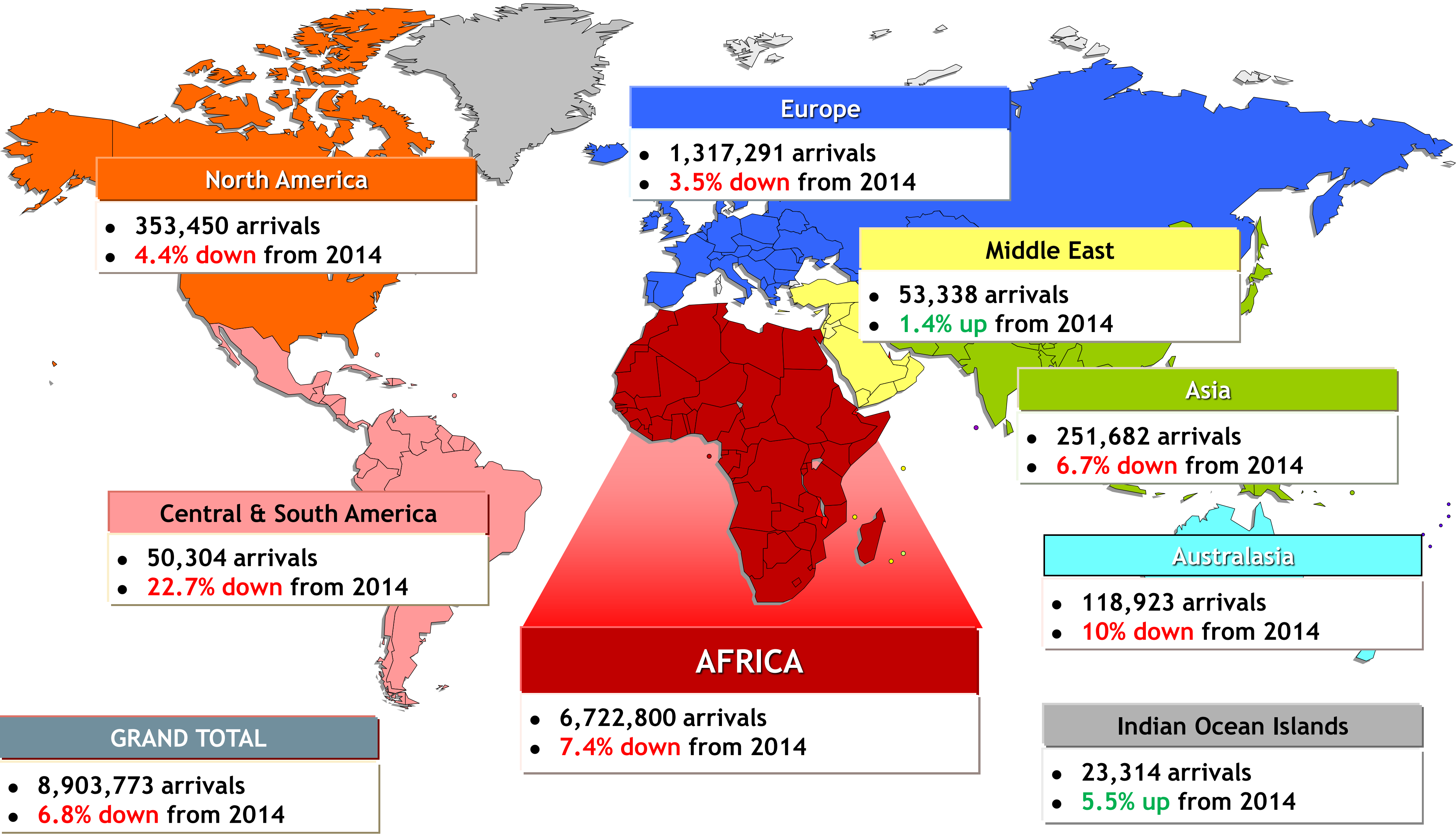
- Demand for international tourism was strongest for destinations in Europe (+5%), the Americas (+4.9%), the Asia-Pacific region (+4.8%) and the Middle East (+3.1%), while Africa saw a decline (-3.3%). The leading sub-regions were the Caribbean (+7.4%), Central America (+7.1%), Central Europe (+6.4%), Northern Europe (+6.3%), North-East Asia (+4.4%), South-East Asia (+5.1%) and Western Europe (+3.7%).

- The limited data available for Africa points to a 3.3% decline in international arrivals, to 53 million. In North Africa arrivals dropped by 8%, while they fell by 1% in sub-Saharan Africa (although this region returned to positive growth in the second half of the year).

South Africa

SOUTH AFRICAN TOURISM

Tourist arrivals to South Africa from January to December 2015 declined by 6.8% compared to the previous year. There were declines from all regions, with the exception of the Middle East and Indian Ocean Islands.



Note : Tourist arrivals figures shown above for January-December 2015
Source: Stats SA Tourism & Migration release December 2015, SAT analysis

South Africa’s Tourism Performance in 2015

- Notwithstanding the 4.4% global growth, South Africa declined by 6.8% to 8.9 million tourist arrivals in 2015 from 9.5 million in 2014. The decline was largely due to shrinking arrivals from Africa land markets.

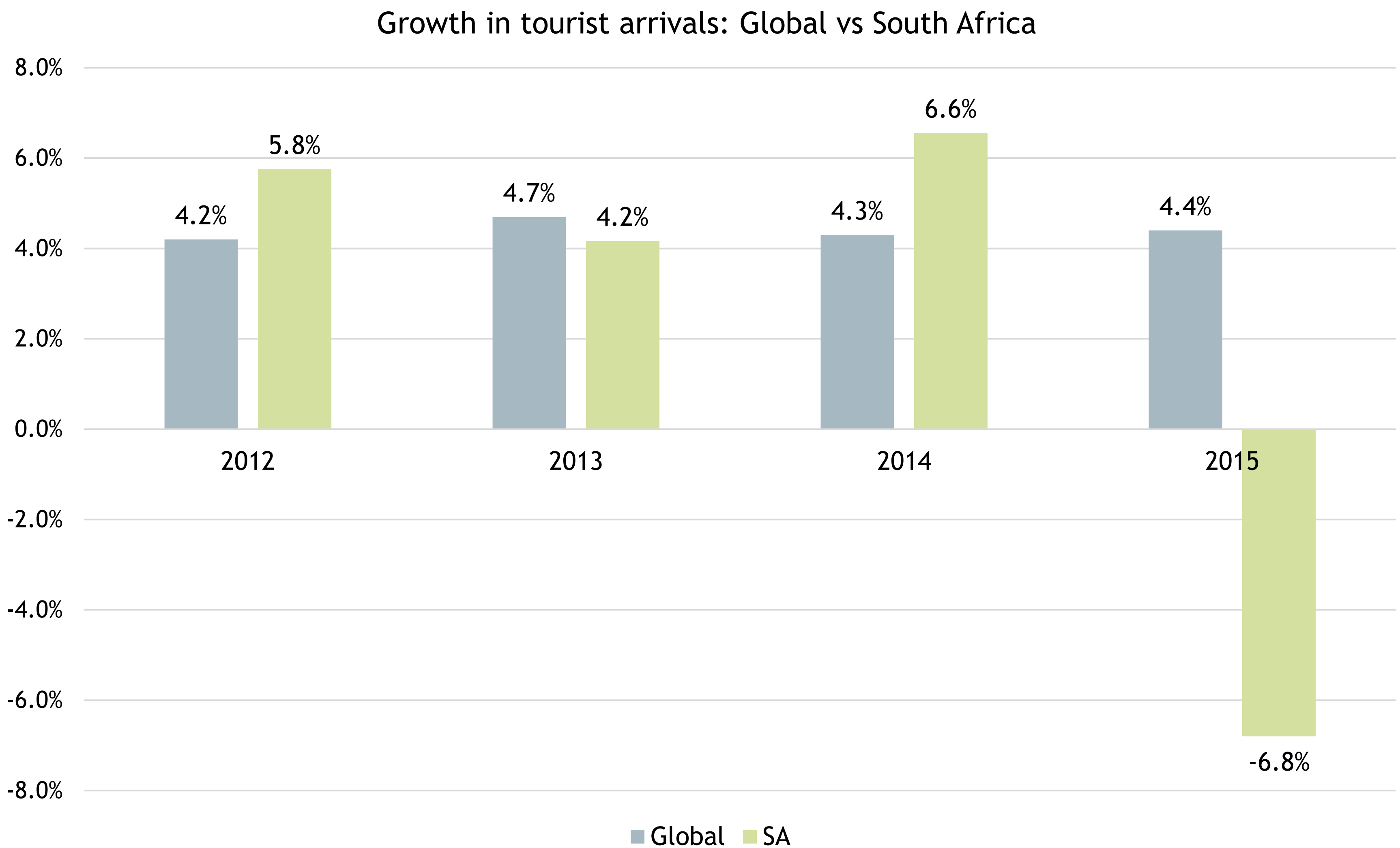
- International tourists on average stayed 9.5 nights in 2015, compared to 8.5 nights in 2014. Bed nights also increased, largely driven by the strong growth in arrivals from Africa air markets.

- Revenue from international tourism grew by 6.2%, largely driven by increased spend (in nominal terms) from Africa air markets, the Americas and Europe.

- The provincial spread improved in 2015, with 13% of international tourists visiting more than one province compared to 2014.

- South Africa’s tourism performance in 2015 was relatively subdued, with total revenue (from both international and domestic tourism) growing by 0.8% to R91.8 billion in 2015, from R91 billion in 2014.

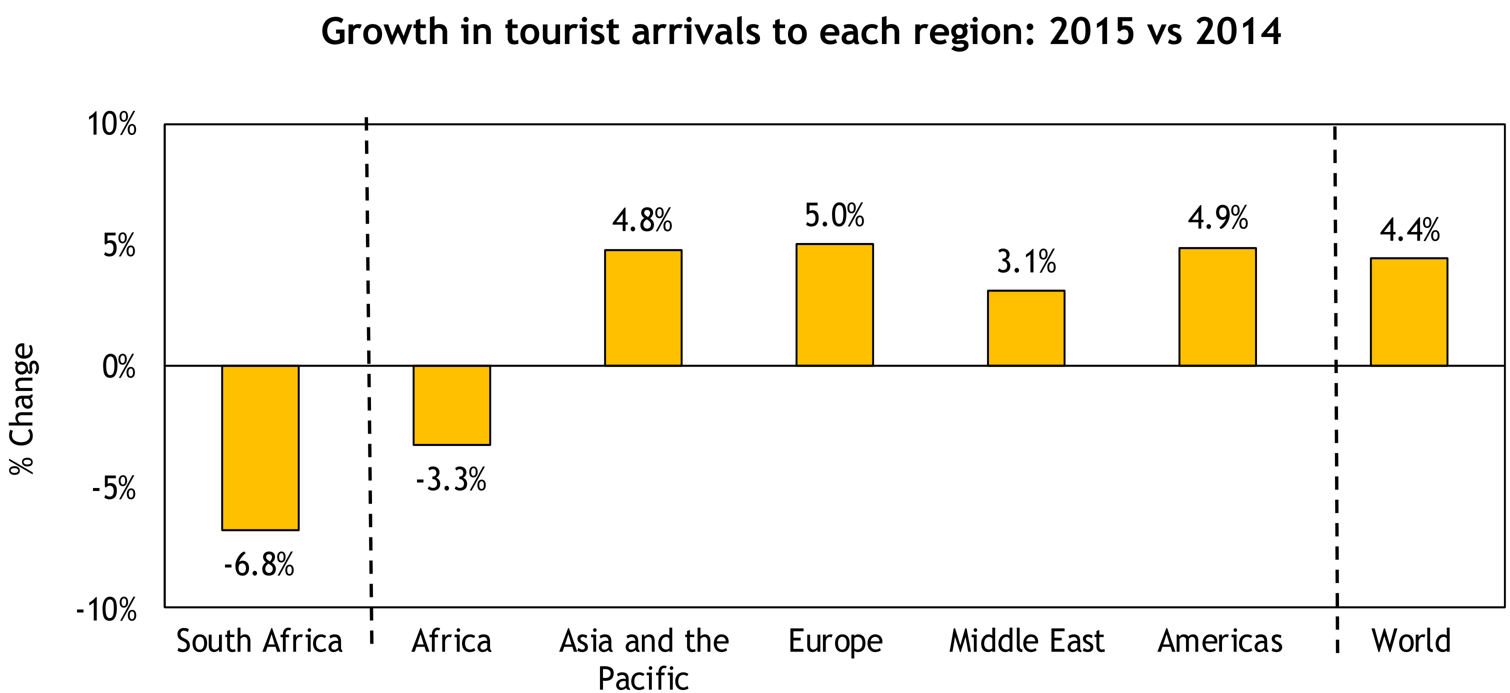
South Africa has shown good performance in tourist arrivals growth relative to the global performance, with the exception of 2015.



Note: UNWTO estimates incorporate provisional data for some regions

Source: Stats SA Tourism & Migration release, SAT analysis; UNWTO World Tourism Barometer, Volume 14, January 2016

Africa and South Africa recorded declines in tourist arrivals in 2015, while all other regions of the world recorded an increase in tourist arrivals.



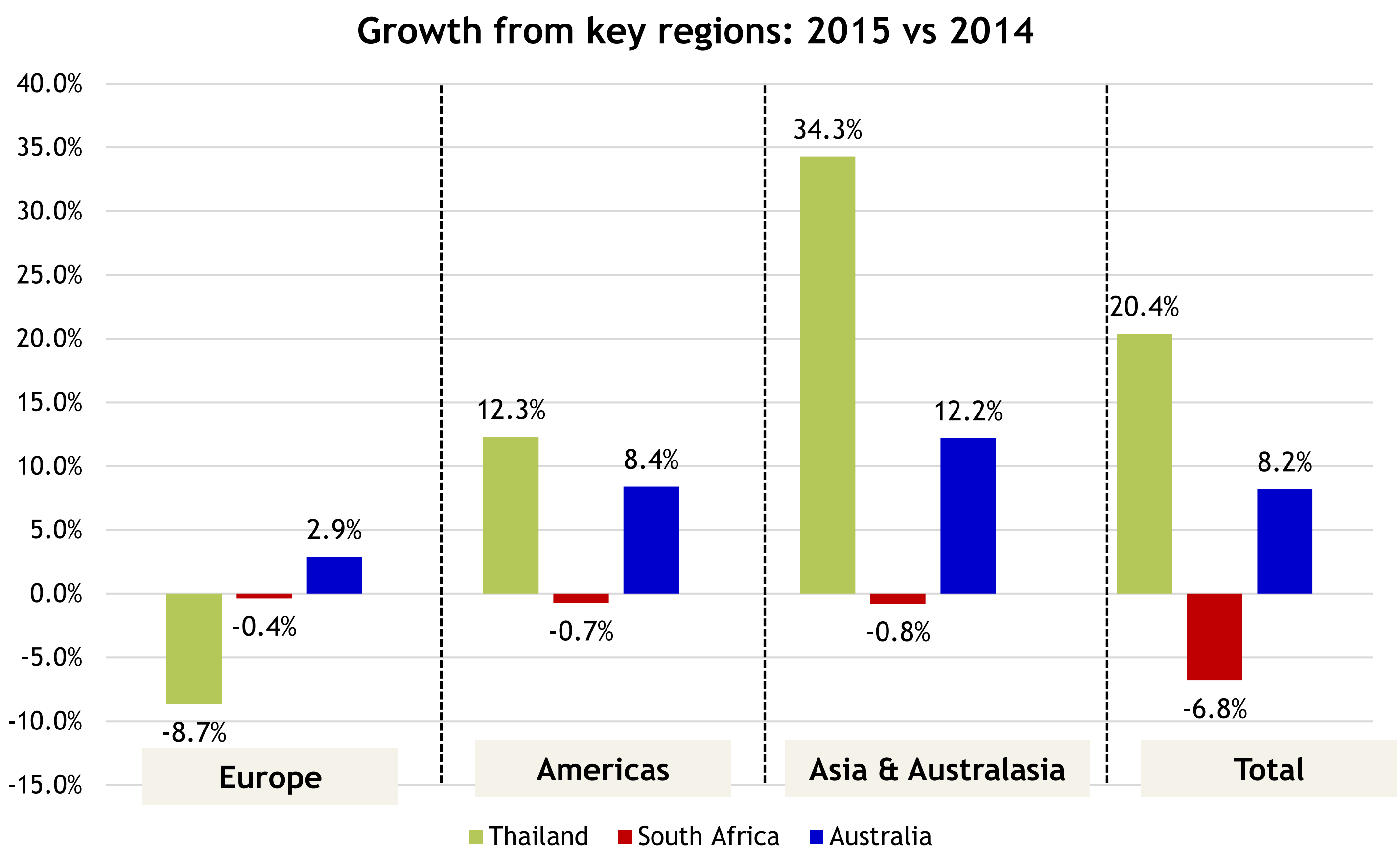
Note: UNWTO estimates incorporate provisional data for some regions

Source: Stats SA Tourism & Migration release, SAT analysis; UNWTO World Tourism Barometer, Volume 14, January 2016

Leisure Tourism Competitor Analysis

- South Africa was ranked 37th in the world in terms of international tourist arrivals in 2015, down from its ranking of 34th in 2014.
- In Africa, South Africa was the third-most visited country in 2015, after Morocco and Egypt.
- From a brand-building perspective, South Africa maintained its performance in the areas of brand awareness and positivity, while key competitors Australia and Thailand were still ahead of South Africa on most parameters.

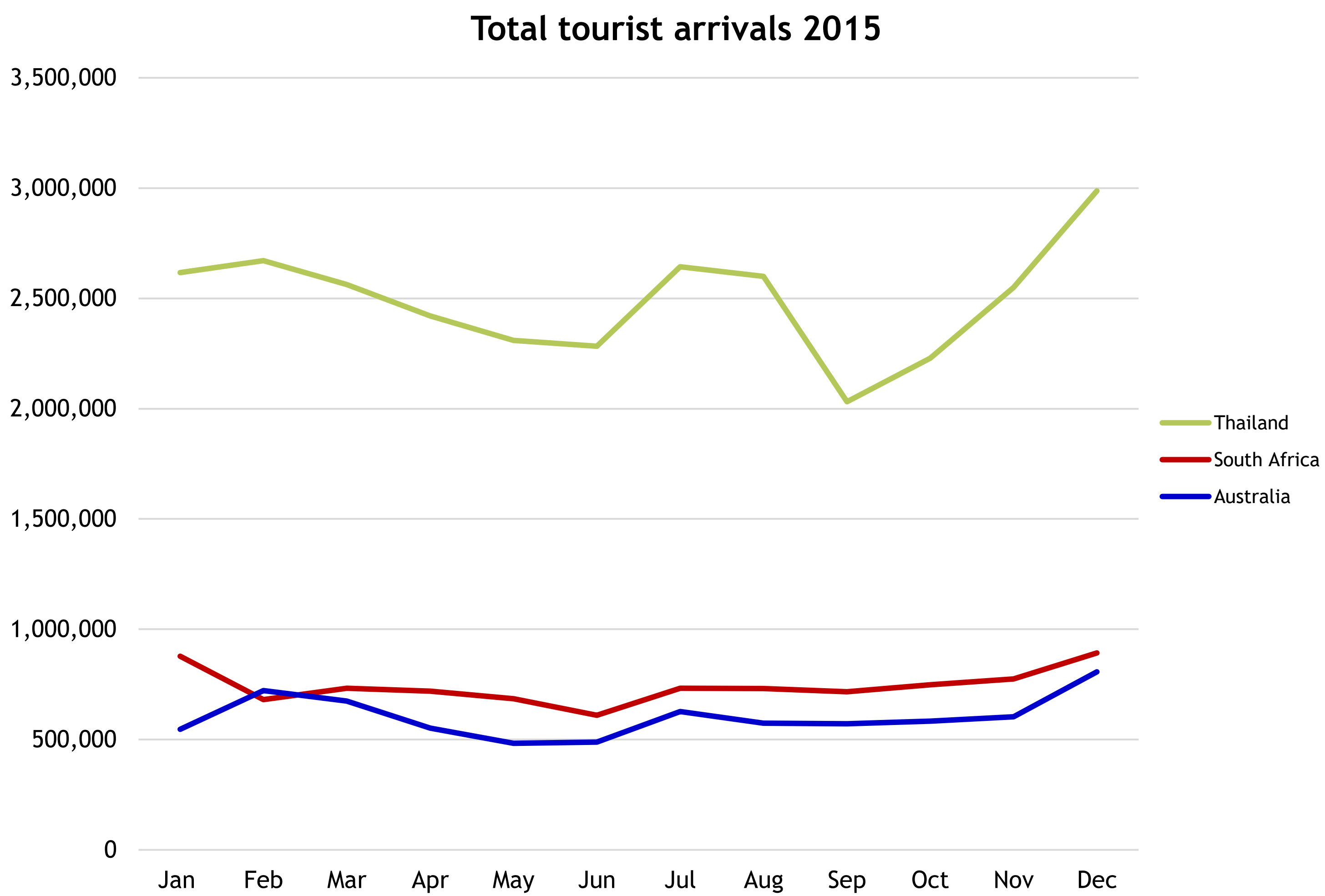
Australia recorded growth from all key regions. In contrast, South Africa recorded declines from all key regions. Thailand only recorded declines from Europe.



Source: Stats SA Tourism & Migration release December 2015, SAT analysis; Thailand Department of Tourism; Tourism Australia

Despite the strong growth in tourist arrivals to Australia in 2015, South Africa still enjoys a larger number of tourist arrivals than Australia.

% Growth (y-o-y):
Thailand: 20.4%
Australia: 8.2%
South Africa: -6.8%



Source: Stats SA Tourism & Migration release December 2015, SAT analysis; Thailand Department of Tourism; Tourism Australia

Immigration Regulations

- All over the world immigration regulations play a major role in travel and tourism, as well as in the movement of human capital in general.
- Although traditional visas are still prevalent in many countries, others are making travel easier by providing visas on arrival, e-visas and visa exemptions.
- Changes to South Africa's immigration regulations affected travel from visa-requiring countries, as well as travel with children from visa-exempt countries.
- Visa processing capacity constraints in markets such as China, India, Russia and Uganda were cited as challenges.
- Confusion remains around the visa requirements and associated perceptions in various markets that South Africa is not safe for children.
- Modifications are underway to ease these regulations in order to better facilitate travel.

Domestic Tourism Landscape in 2015

- Domestic trips declined by 12.5% in 2015 despite an increase of 3.3% in the number of tourists taking trips in the same year. These declines were driven by tourists taking fewer trips.
- Within South Africa, the share of trips attributed to holidays increased from 10% to 11% of total trips taken. Holiday trips taken within South Africa declined by 2.6%, from 2.8 million in 2014 to 2.7 million in 2015.
- Although Visiting Friends and Relatives (VFR) remained the main reason for travelling, VFR trips dropped by almost 16%, contributing to the overall decline in domestic trips taken.
- Revenue from domestic tourism declined by 11.9%, mainly driven by local tourists taking fewer holiday and VFR trips. According to the South African Tourism Domestic Survey of 2015, 48% of the adult population cited the non-affordability of travel, as well as unemployment or no income, as the main reasons for not travelling.

Business Events Landscape in 2015

- In 2015 South Africa was the number one meetings destination in Africa and was ranked 38th globally, according to the International Congress and Convention Association (ICCA) ranking.

- South Africa saw a massive growth in the hosting of business events in 2014 compared to 2013. In 2015, while it still exhibited a strong growth trajectory compared to 2012 and 2013, there was a contraction in its performance.

- Whilst South Africa has successfully established itself as the prominent main entry point to the subcontinent, countries like Nigeria, Ghana, Kenya and Zimbabwe are becoming more competitive.

- The average timeframe between bidding for and securing business events in two years. This means that South Africa will realise the benefits and the profits of the events secured in 2016, only in 2018 when the event takes place.

- Subvention Fund (bid funding support) impacts the competiveness of global business events destinations. The competitiveness of South Africa as a business events destination is negatively affected by country’s lack of sufficient bid support.

Tourism Grading Landscape in 2015

- According to Statistics South Africa, South Africa's accommodation industry had more than 10 000 accommodation establishments in 2015, with approximately 50% of these facilities being graded.

- 85% of the 10 000 properties were non-hotel establishments and 15% were large hotel chains and facilities for meetings, exhibitions and special events.

- The large hotel groups and conference facilities accounted for 50% of graded rooms. The remaining 50% of rooms were in small to medium-sized establishments.

- The UNWTO Report on Online Guest Reviews and Hotel Classification Systems also showed that consumer reviews complement the quality grading programmes of a number of countries.

- Market insights and trends showed a dramatic increase in online user-generated consumer reviews, putting pressure on product owners to ensure service excellence and high-quality tourism offerings over and above the quality of the buildings, furniture and fittings of the physical establishment.

- The TGCSA has learnt from these initiatives and will begin to integrate online user-generated consumer reviews into the grading process, to allow the establishment owners across South Africa to focus and improve their service offering.

SOUTH AFRICAN TOURISM

Annexure 2

Leisure Marketing Overview in 2015

5th Leisure Tourism Market Portfolio: 01/04/2014 – 30/03/2017

Table 1	AFRICA & MIDDLE EAST	AMERICAS	ASIA & AUSTRALIA	EUROPE
CORE MARKETS	Angola Domestic Kenya Mozambique Nigeria Tanzania	Brazil USA	Australia China India	France Germany Netherlands UK
INVESTMENT MARKETS	Botswana DRC Ghana Lesotho Uganda Zimbabwe	Canada	Japan South Korea	Italy Russia
TACTICAL MARKETS	Namibia UAE Zambia	-	Singapore	Switzerland
WATCH-LIST MARKETS	Ethiopia Malawi Swaziland	Argentina	New Zealand	Austria, Belgium, Denmark, Finland, Norway, Spain, Sweden, Turkey
STRATEGIC IMPORTANCE	Egypt Israel Morocco Saudi Arabia Tunisia	-	Malaysia	-

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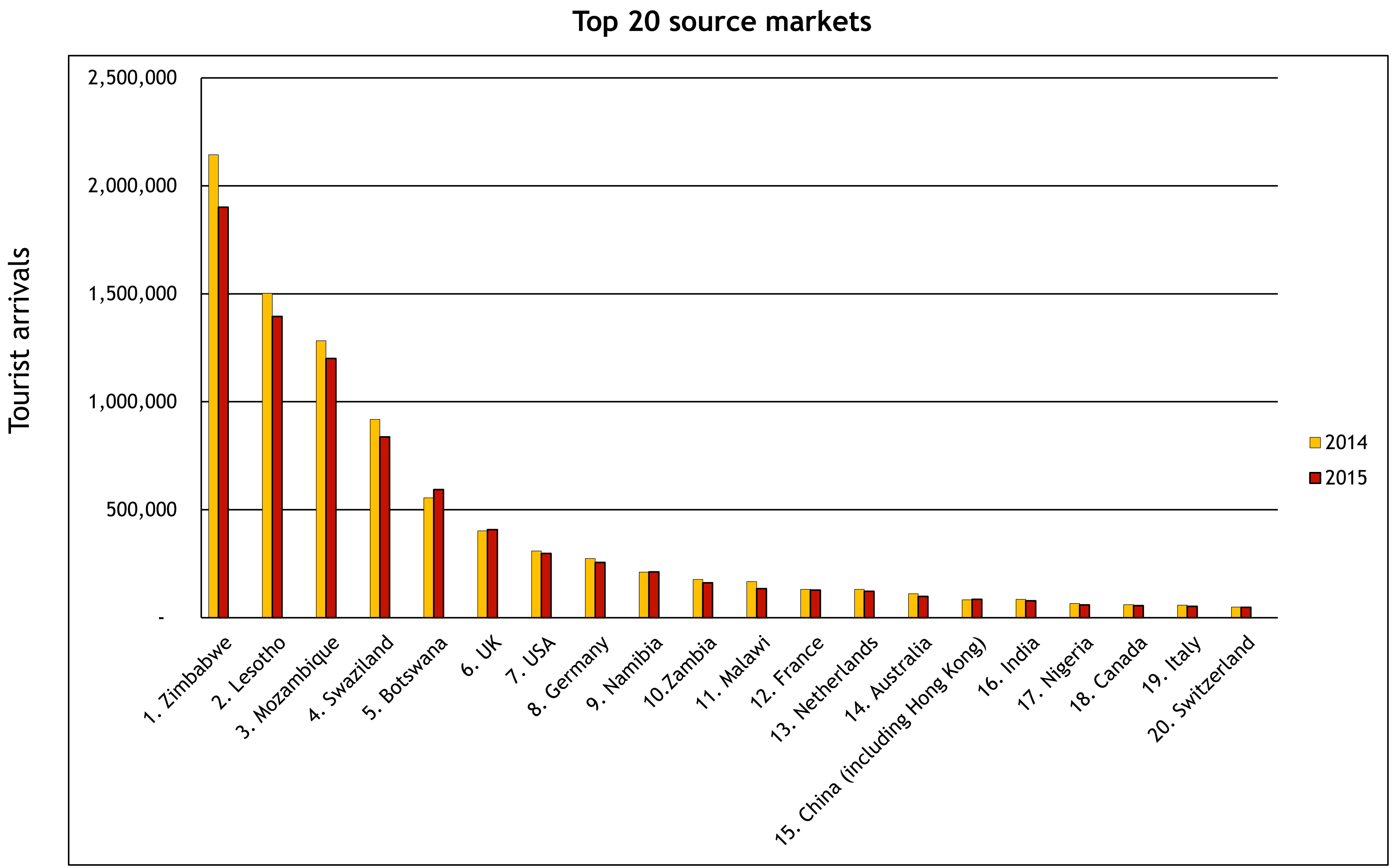
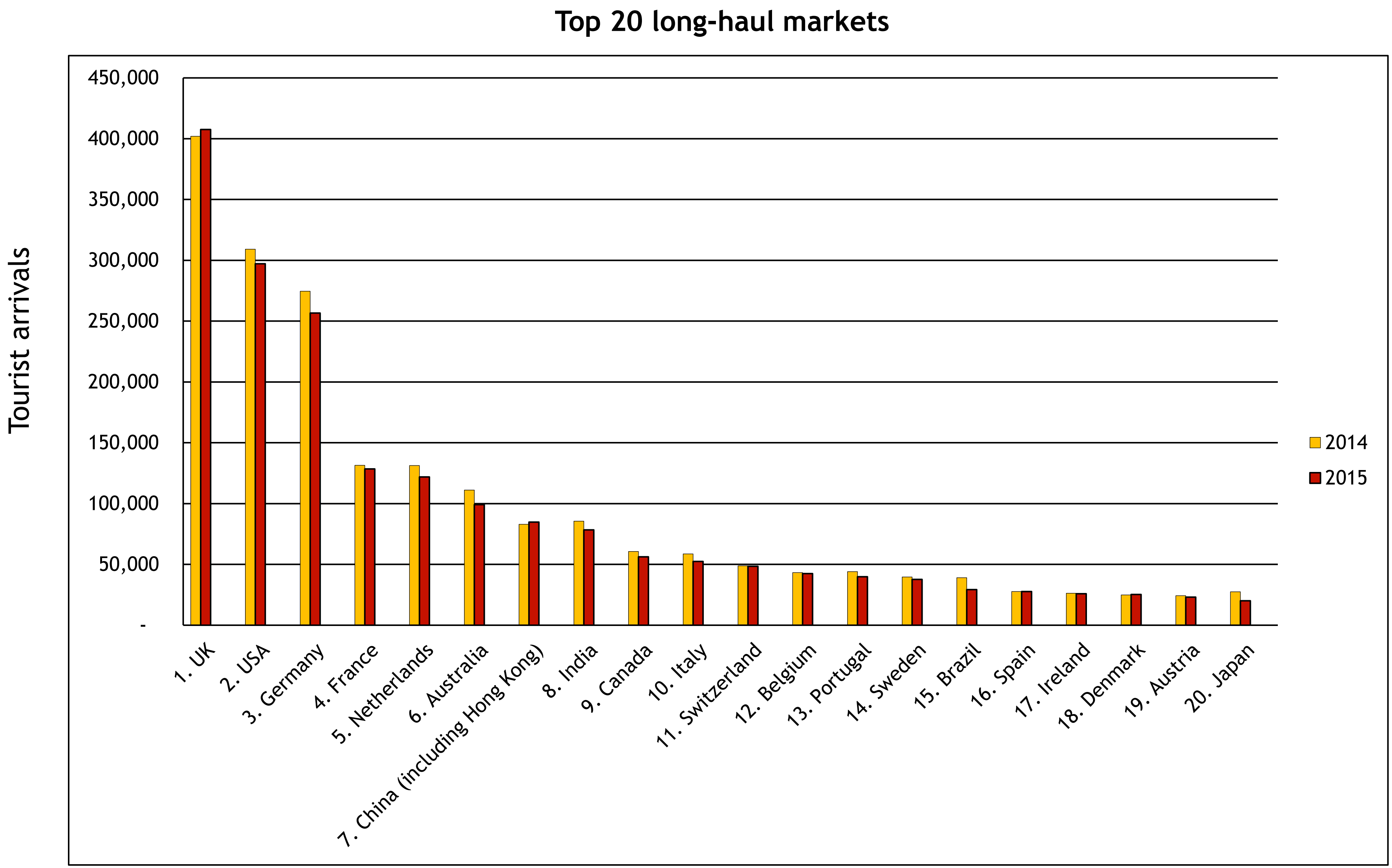
Neighbouring markets continue to be the major source of tourist arrivals in South Africa.



Note: *A tourist arrival is defined as a non-resident who stays for more than 24 hours but less than one year in the country and excludes “workers” and “contract workers”. As of 2014, Statistics SA is no longer able to provide statistics on transit tourists and therefore a new baseline is now created.

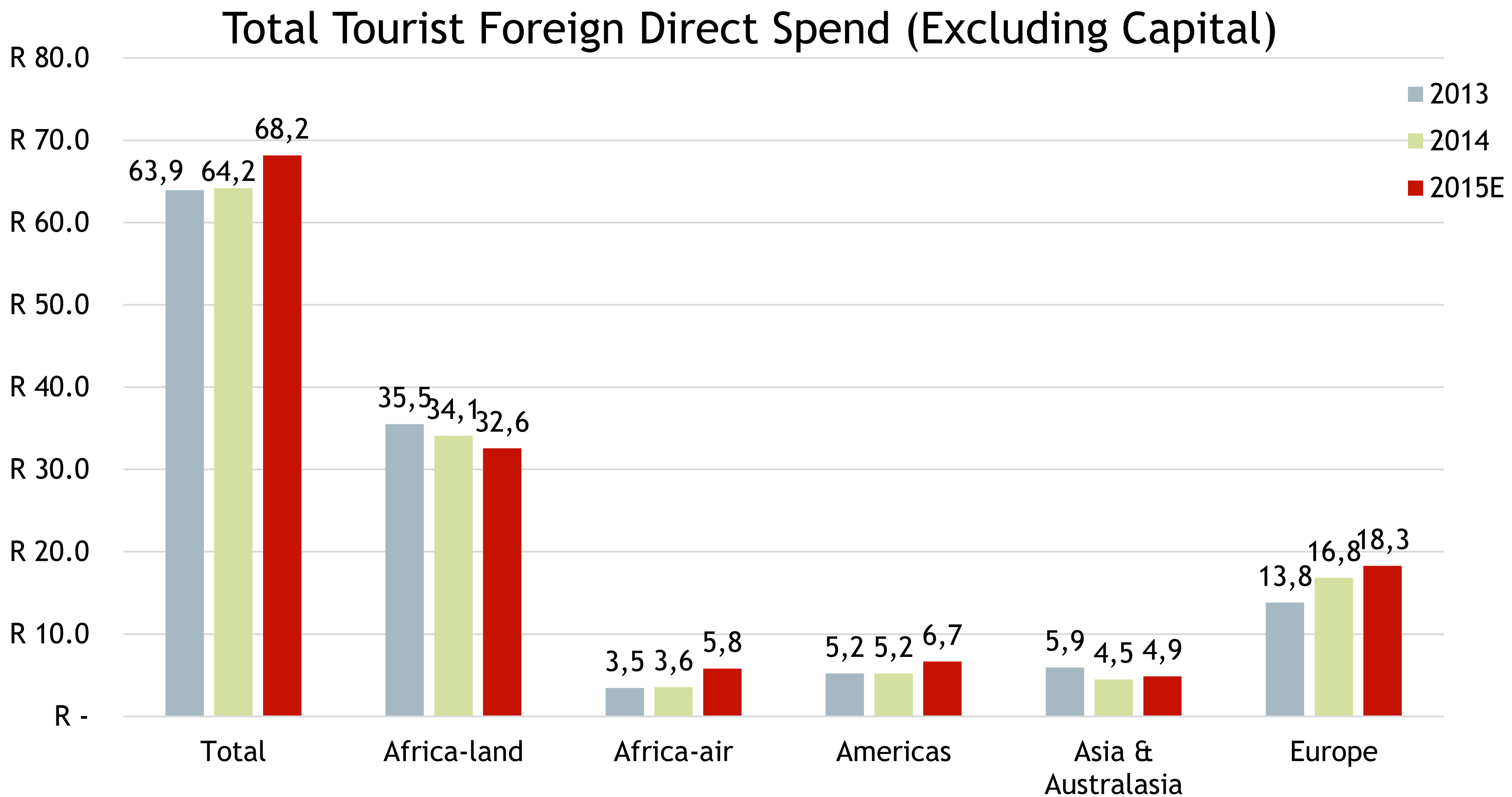
Source: Stats SA Tourism & Migration release December 2014, SAT analysis

The UK, USA, Germany, France and Netherlands are the top five long-haul source markets.



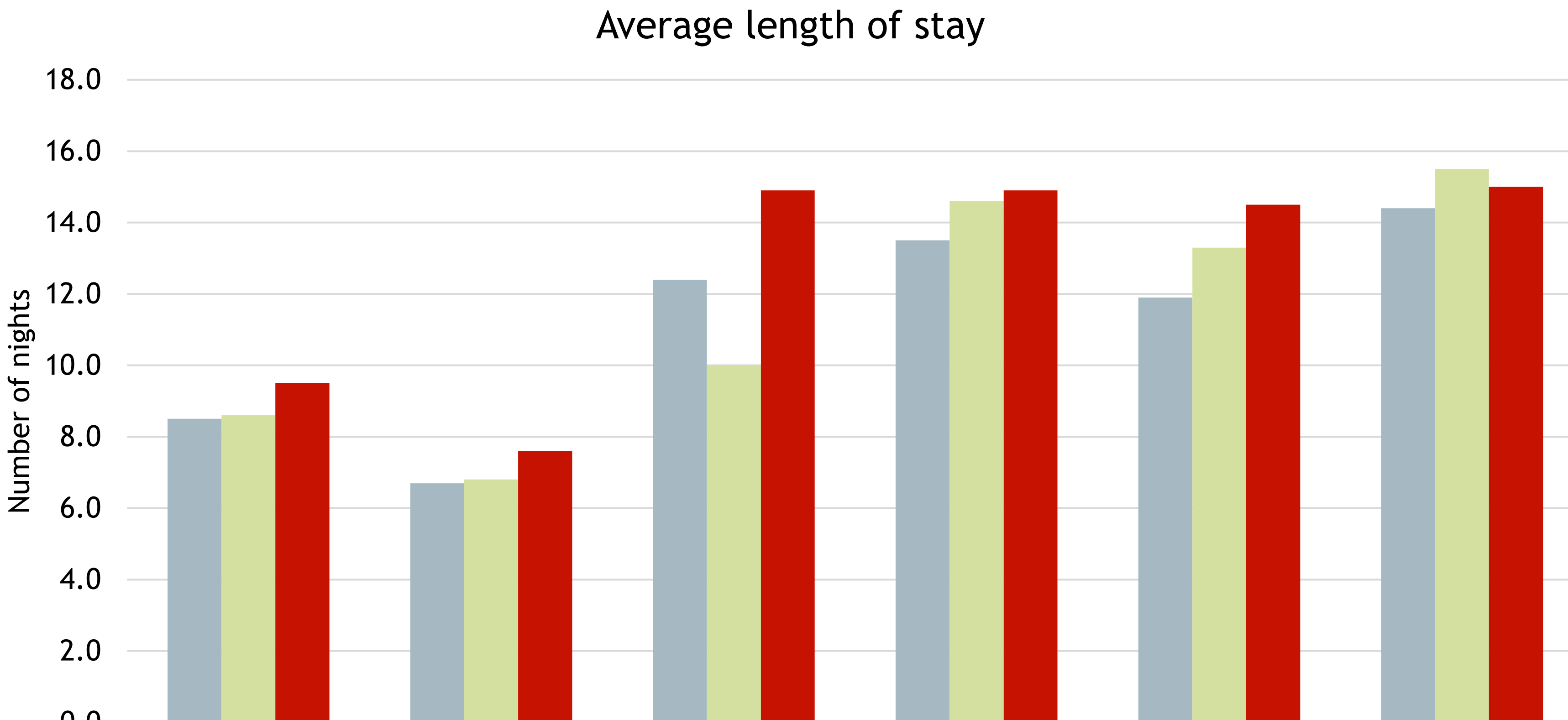
Source: Stats SA Tourism & Migration release December 2015, SAT analysis

Estimated total tourist foreign direct spend increased by 6.2% between 2014 and 2015. Increases were recorded from all regions, with the exception of Africa land markets.



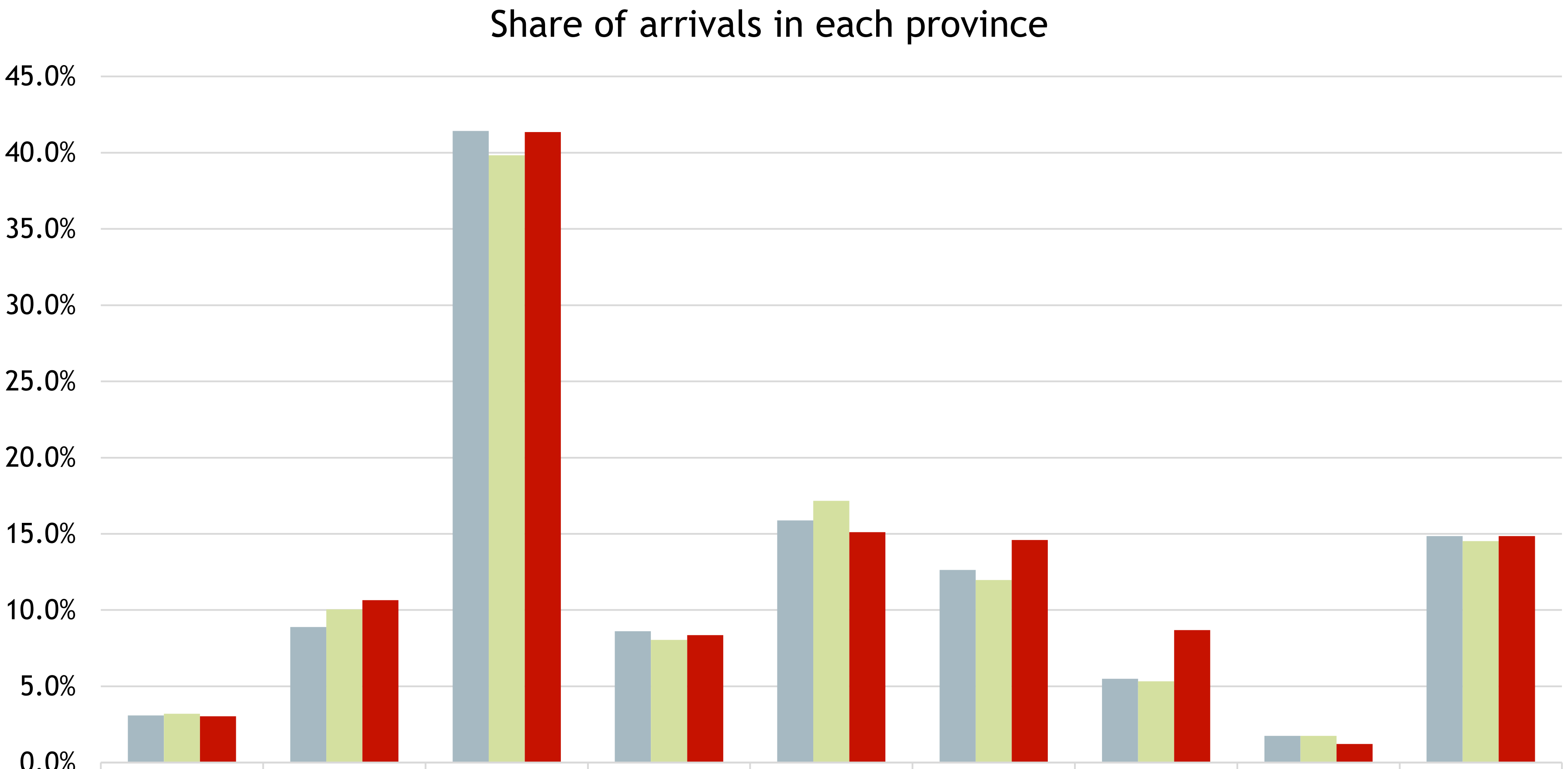
2013	R7,300	R5,500	R10,600	R13,100	R14,100	R12,300
2014	R7,000	R4,900	R11,000	R13,400	R12,700	R14,400
2015E	R8,100	R5,200	R19,200	R18,600	R14,800	R15,800

The average length of stay of all tourists remained fairly flat, while tourists from both African land and air markets stayed longer on average.



	Total	Africa-land	Africa-air	Americas	Asia & Australasia	Europe
2013	8.5	6.7	12.4	13.5	11.9	14.4
2014	8.6	6.8	10	14.6	13.3	15.5
2015E	9.5	7.6	14.9	14.9	14.5	15

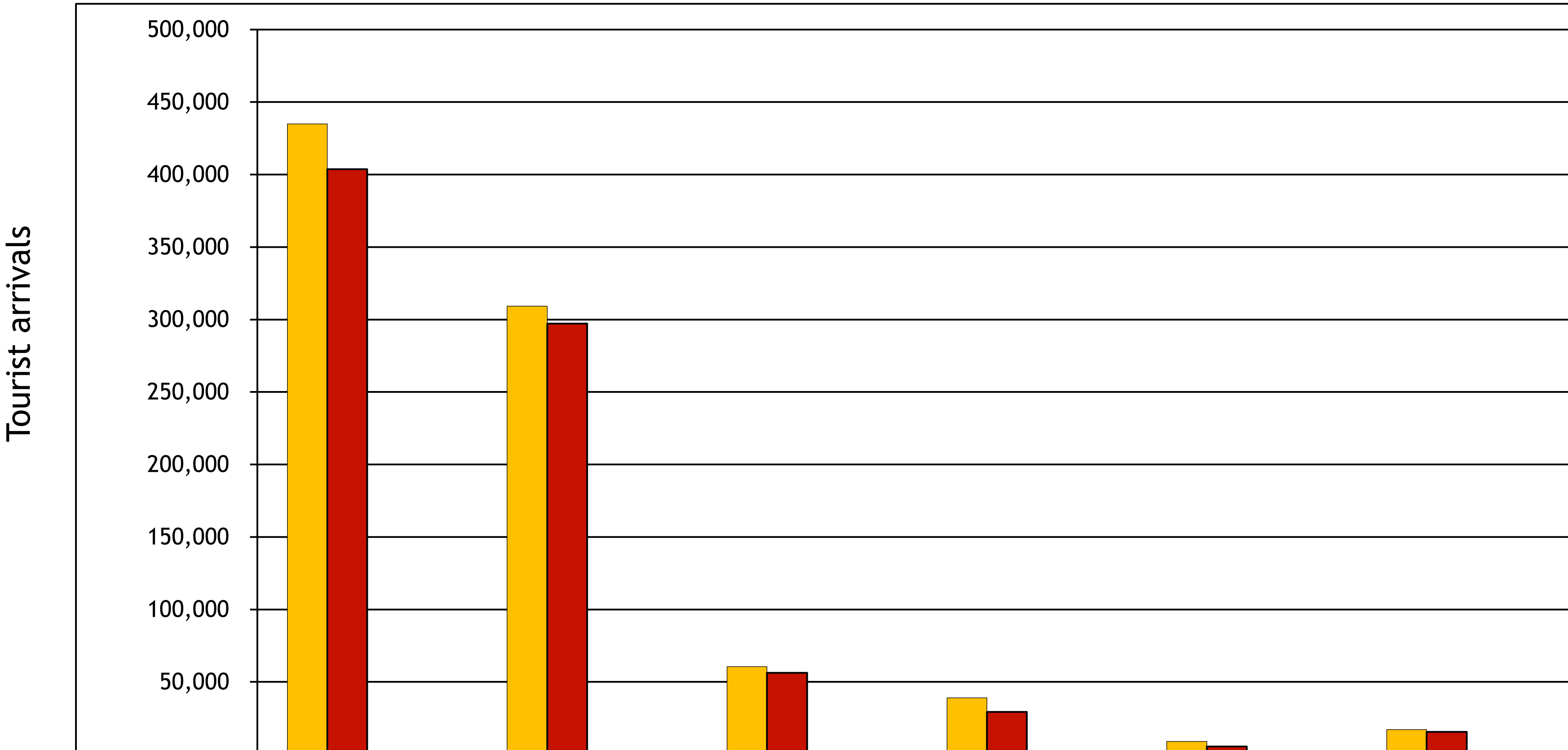
Six of the nine provinces recorded an increase in their share of total arrivals in 2015.



	Eastern Cape	Free State	Gauteng	Kwazulu Natal	Limpopo	Mpumalang a	North West	Northern Cape	Western Cape
2013	3.1%	8.9%	41.4%	8.6%	15.9%	12.6%	5.5%	1.7%	14.8%
2014	3.2%	10.1%	39.8%	8.0%	17.2%	12.0%	5.3%	1.7%	14.5%
2015E	3.0%	10.6%	41.4%	8.4%	15.1%	14.6%	8.7%	1.2%	14.9%

Arrivals from all major markets in the Americas region decreased in 2015, with sharp decreases noted from Brazil and Argentina.

Tourist arrivals in South Africa from the Americas, Jan-Dec 2015

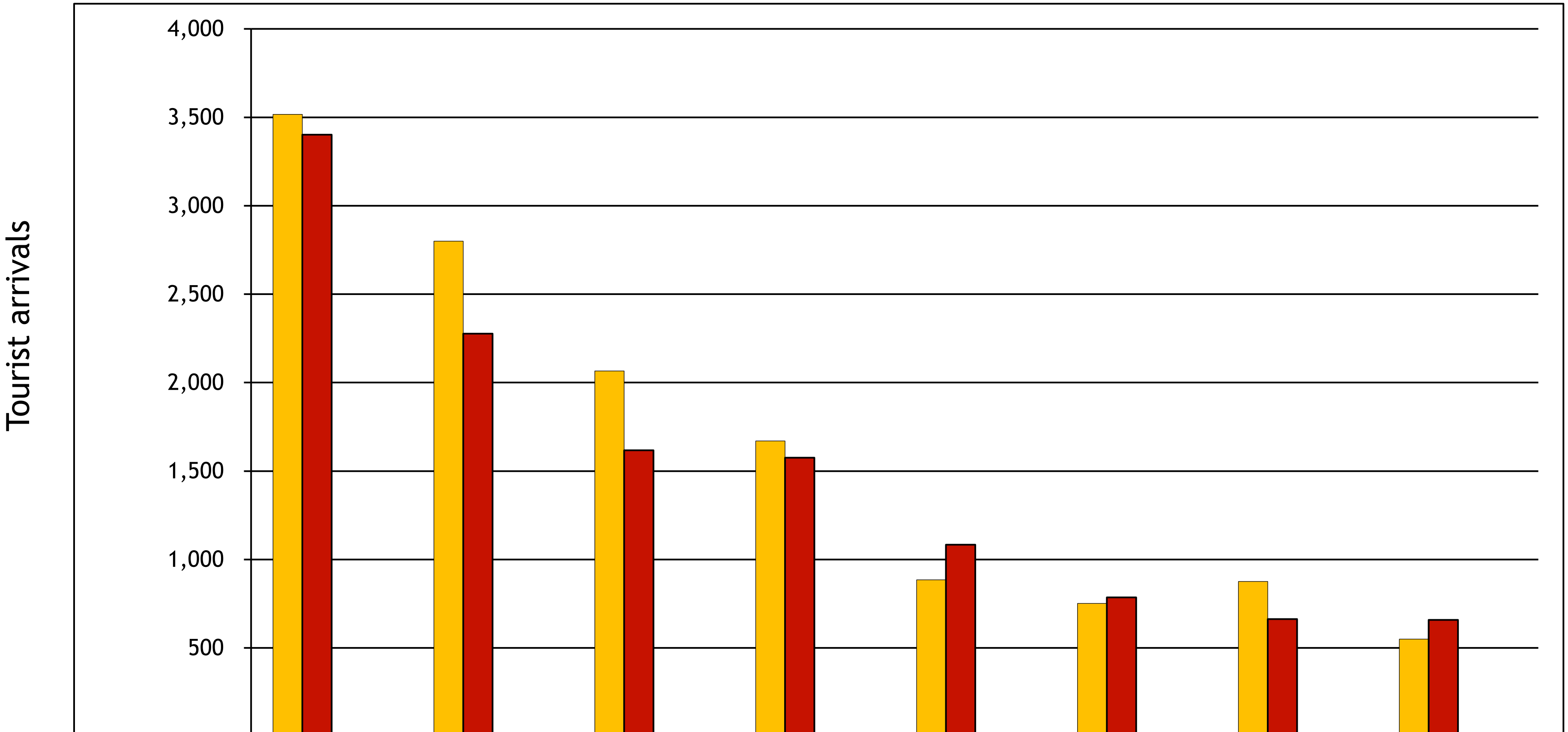


	Americas	USA	Canada	Brazil	Argentina	Other Americas
2014	434,919	309,255	60,544	39,082	9,009	17,029
2015	403,754	297,226	56,224	29,339	5,480	15,485
Difference	-31,165	-12,029	-4,320	-9,743	-3,529	-1,544
% Change	-7.2%	-3.9%	-7.1%	-24.9%	-39.2%	-9.1%

Source: Stats SA Tourism & Migration release December 2015, SAT analysis

There has been a 9.1% decrease from markets in the "Other Americas" region, with the exception of Jamaica and Cuba.

Tourist arrivals in South Africa from the top "Other Americas" markets, Jan-Dec 2015



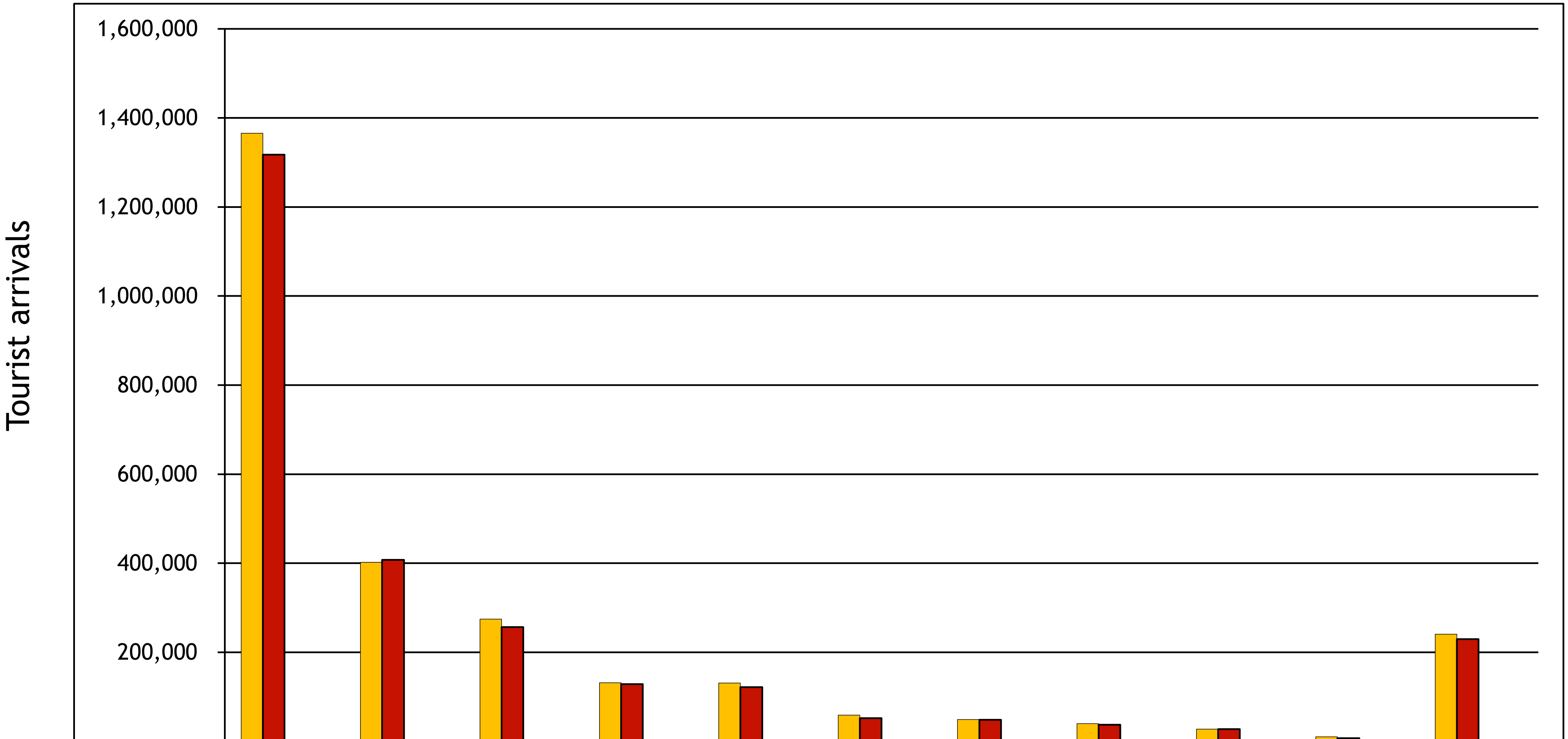
	Mexico	Chile	Colombia	Peru	Venezuela	Cuba	Uruguay	Jamaica
2014	3,517	2,799	2,066	1,670	885	751	875	550
2015	3,402	2,277	1,617	1,576	1,083	785	663	658
Difference	-115	-522	-449	-94	198	34	-212	108
% Change	-3.3%	-18.7%	-21.7%	-5.6%	* 22.4%	4.5%	-24.2%	19.6%

NB:* 2014 missing arrivals from Stats SA in November & December

Source: Stats SA Tourism & Migration release December 2015, SAT analysis

There was 3.5% decrease in tourist arrivals from Europe, with the UK and Spain being the only major markets that recorded growth in 2015.

Tourist arrivals in South Africa from Europe, Jan-Dec 2015

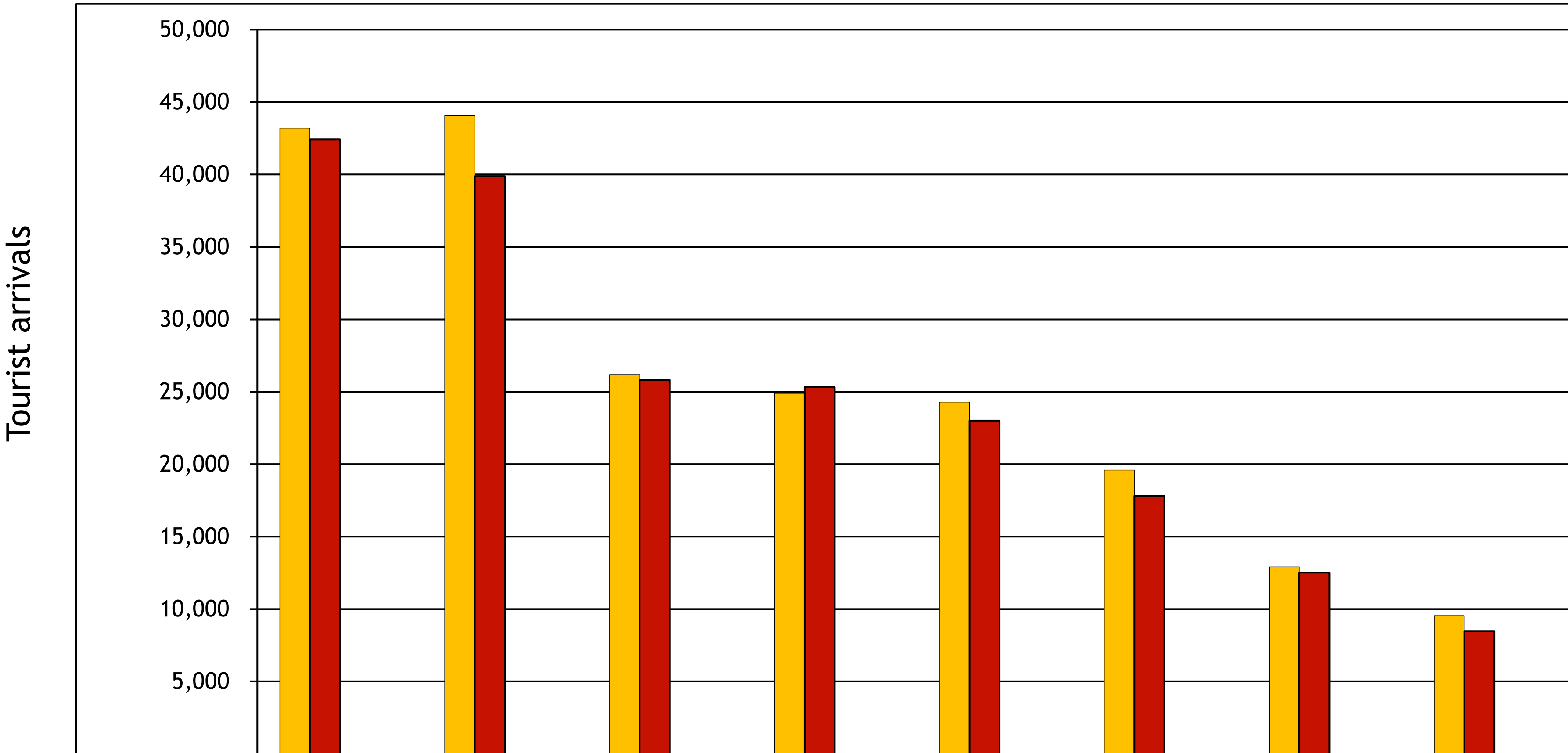


	Europe	UK	Germany	France	Netherlands	Italy	Switzerland	Sweden	Spain	Russian Fed	Other Europe
2014	1,365,472	401,914	274,571	131,502	131,287	58,605	48,880	39,696	27,666	10,410	240,941
2015	1,317,291	407,486	256,646	128,438	121,883	52,377	48,510	37,623	27,737	7,244	229,347
Difference	-48,181	5,572	-17,925	-3,064	-9,404	-6,228	-370	-2,073	71	-3,166	-11,594
% Change	-3.5%	1.4%	-6.5%	-2.3%	-7.2%	-10.6%	-0.8%	-5.2%	0.3%	-30.4%	-4.8%

Source: Stats SA Tourism & Migration release December 2015, SAT analysis

Only Denmark recorded a growth in tourist arrivals within the “Other Europe” category.

Tourist arrivals from top “Other Europe” markets, Jan-Dec 2015

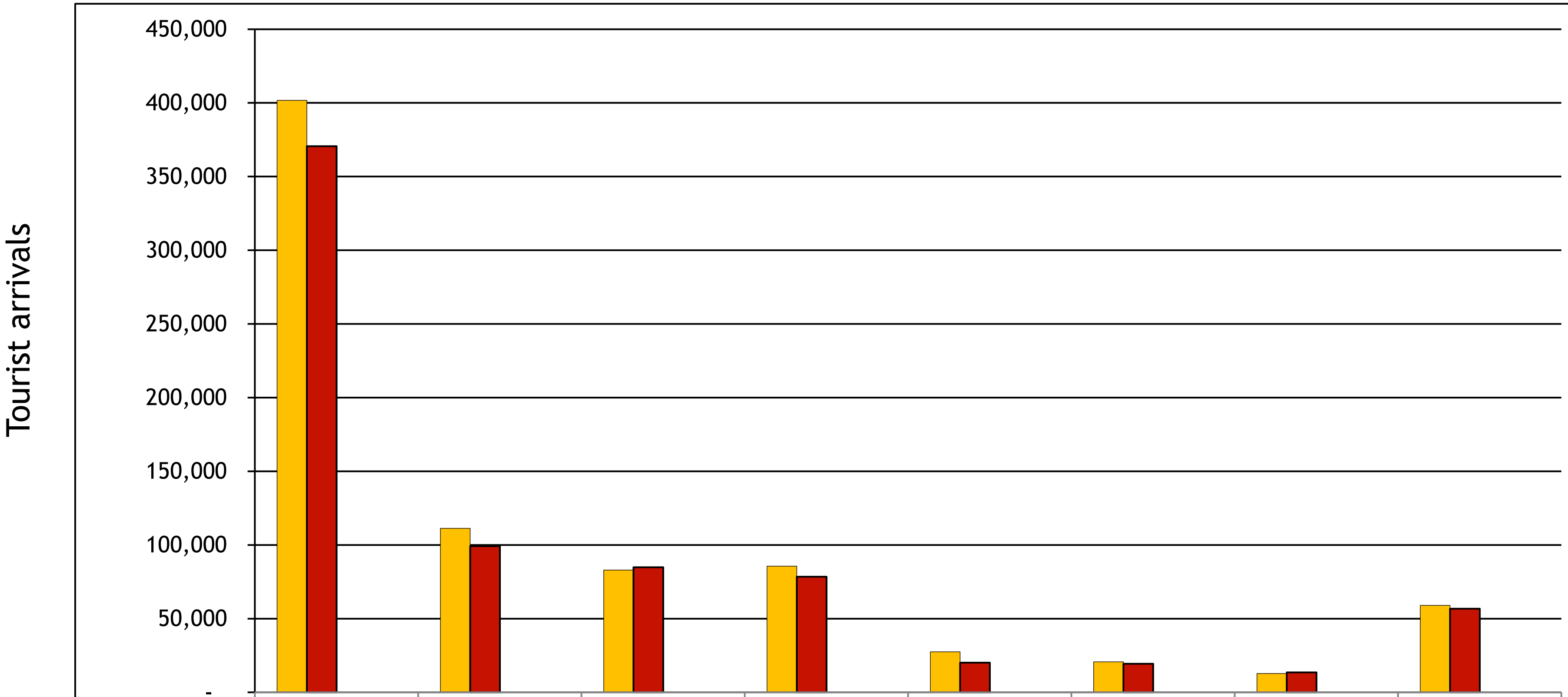


	Belgium	Portugal	Ireland	Denmark	Austria	Norway	Poland	Finland
2014	43,205	44,058	26,192	24,883	24,290	19,599	12,897	9,538
2015	42,425	39,885	25,823	25,320	23,002	17,809	12,515	8,484
Difference	-780	-4,173	-369	437	-1,288	-1,790	-382	-1,054
% Change	-1.8%	-9.5%	-1.4%	1.8%	-5.3%	-9.1%	-3.0%	-11.1%

Source: Stats SA Tourism & Migration release December 2015, SAT analysis

Asia & Australasia saw a 7.7% decrease in tourist arrivals, with declines from all markets in the region except China, which is up 2.2%.

Tourist arrivals in South Africa from Asia & Australasia, Jan-Dec 2015

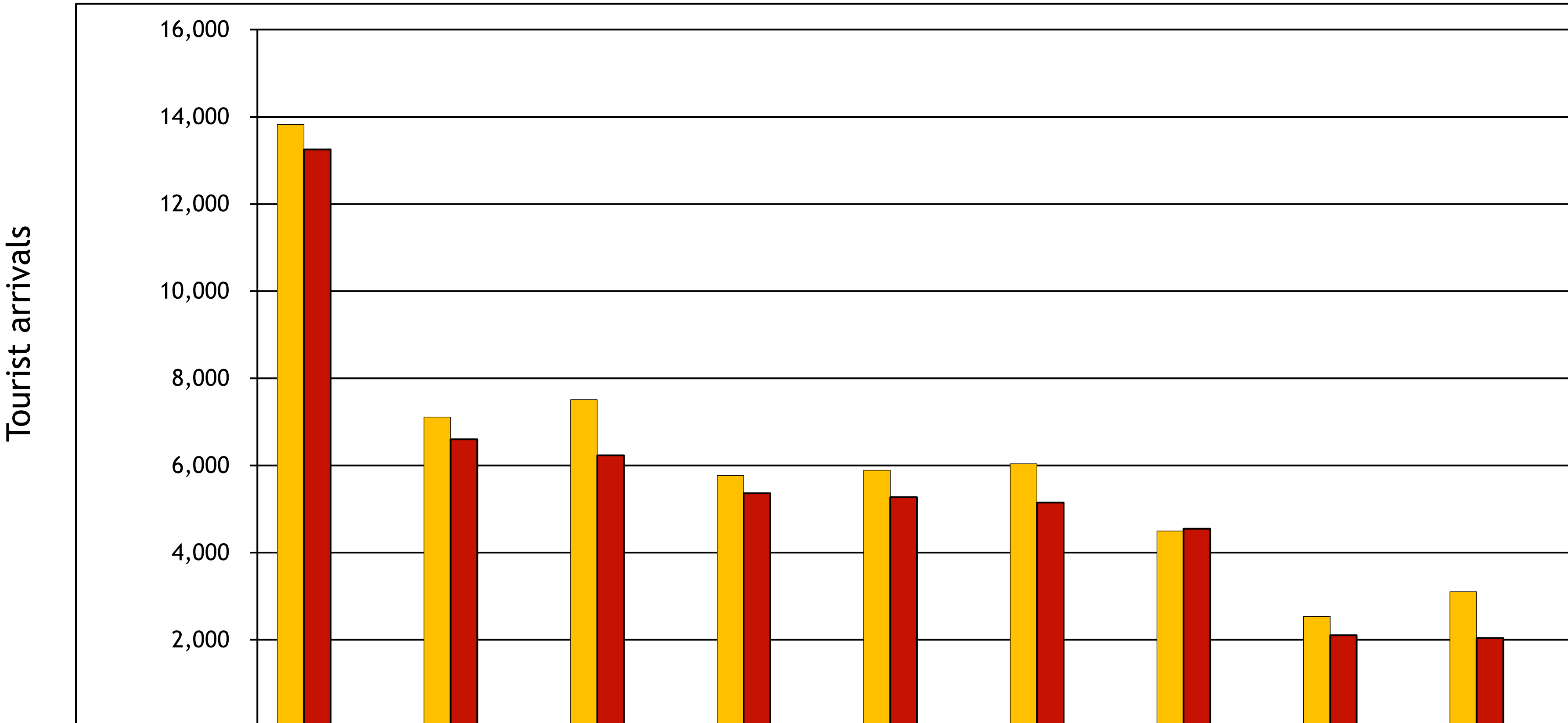


	Asia & Australasia	Australia	China (including Hong Kong)	India	Japan	New Zealand	Rep of Korea	Other Asia & Australasia
2014	401,714	111,213	83,024	85,639	27,504	20,622	12,846	59,012
2015	370,605	99,205	84,878	78,385	20,202	19,435	13,561	56,793
Difference	-31,109	-12,008	1,854	-7,254	-7,302	-1,187	715	-2,219
% Change	-7.7%	-10.8%	2.2%	-8.5%	-26.6%	-5.8%	* 5.6%	-3.8%

NB:* 2014 missing arrivals from Stats SA in November & December
Source: Stats SA Tourism & Migration release December 2015, SAT analysis

The 3.8% decrease from “Other Asia & Australia” markets was driven by decreases from most markets in this category.

Tourist arrivals from top “Other Asia & Australasia” markets, Jan-Dec 2015

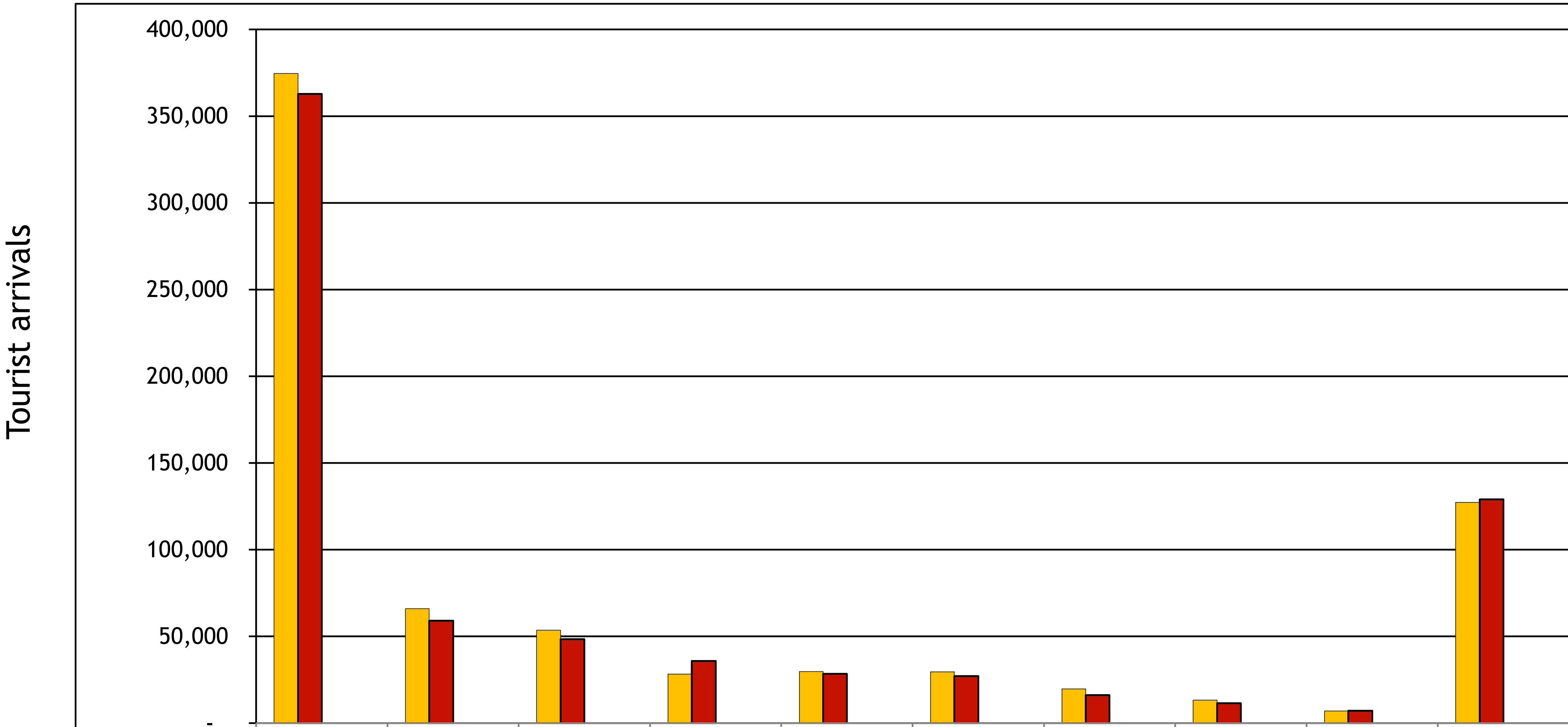


	Pakistan	Malaysia	Singapore	Rep of China (Taiwan)	Philippines	Thailand	Bangladesh	Sri Lanka	Indonesia
2014	13,822	7,109	7,511	5,769	5,889	6,039	4,495	2,540	3,102
2015	13,248	6,597	6,234	5,361	5,269	5,149	4,549	2,105	2,040
Difference	-574	-512	-1,277	-408	-620	-890	54	-435	-1,062
% Change	-4.2%	-7.2%	-17.0%	* -7.1%	-10.5%	-14.7%	1.2%	-17.1%	-34.2%

NB:* 2014 missing arrivals from Stats SA in November & December
Source: Stats SA Tourism & Migration release December 2015, SAT analysis

Africa air markets showed a decline of 3.1%, with declines recorded across all major markets in the region.

Tourist arrivals in South Africa from Africa air markets, Jan-Dec 2015



	Africa Air	Nigeria	Angola	Tanzania	Dem Rep of Congo	Kenya	Ghana	Uganda	Ethiopia	Other Africa Air
2014	374,575	65,973	53,592	28,221	29,800	29,586	19,789	13,286	7,070	127,258
2015	362,860	59,002	48,416	35,817	28,503	27,077	16,184	11,561	7,210	129,090
Difference	-11,715	-6,971	-5,176	7,596	-1,297	-2,509	-3,605	-1,725	140	1,832
% Change	-3.1%	-10.6%	-9.7%	*26.9%	-4.4%	-8.5%	-18.2%	-13.0%	2.0%	1.4%

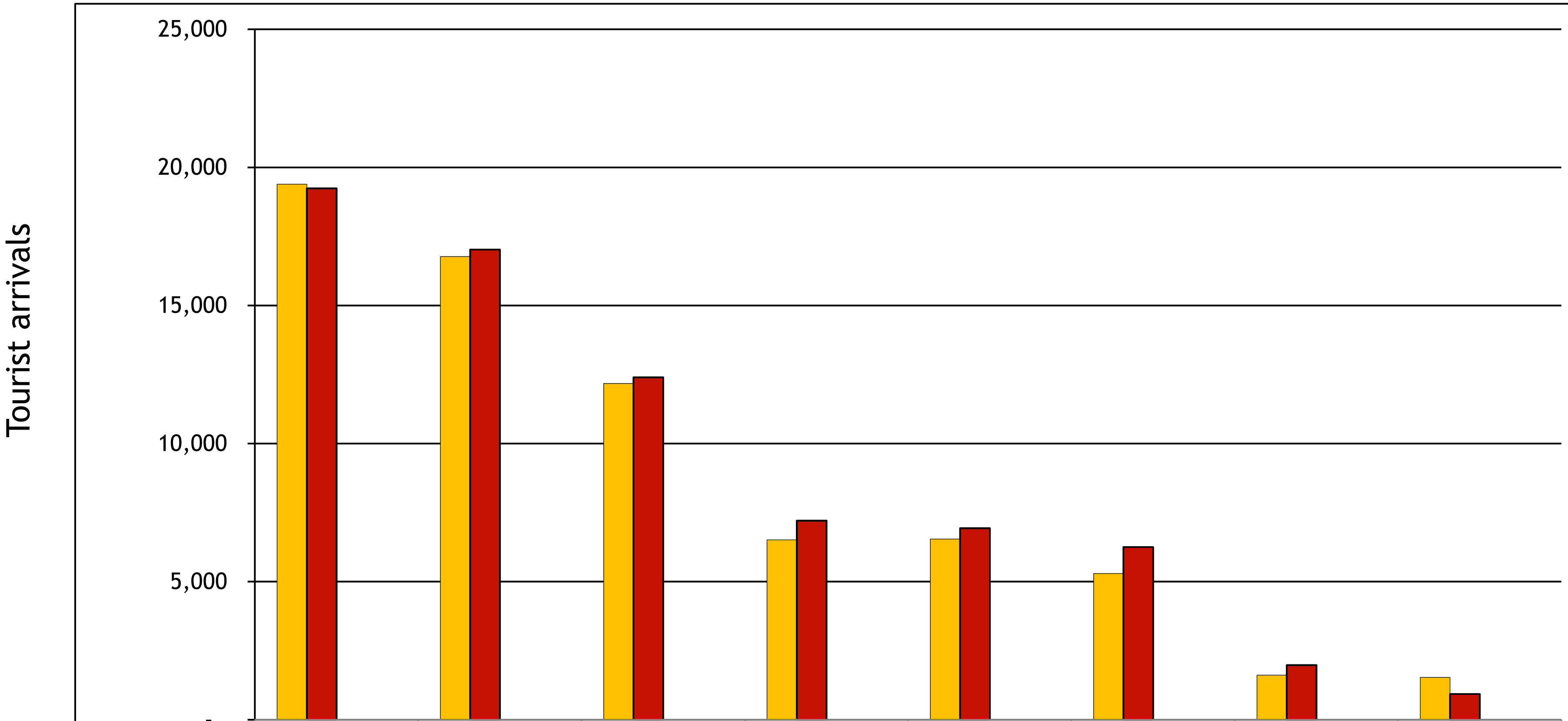
NB:* 2014 missing arrivals from StatsSA in November & December

Note: Africa air markets are markets where at least 60% of arrivals in SA use air transport; Africa land markets are markets where at least 60% of arrivals in SA use road transport. Long-haul markets include all countries outside Africa

Source: Stats SA Tourism & Migration release December 2015, SAT analysis

Most of the markets in the "other" Africa air category showed positive growth, with the exception of Rwanda.

Tourist arrivals in South Africa from the top "Other Africa air" markets, Jan-Dec 2015

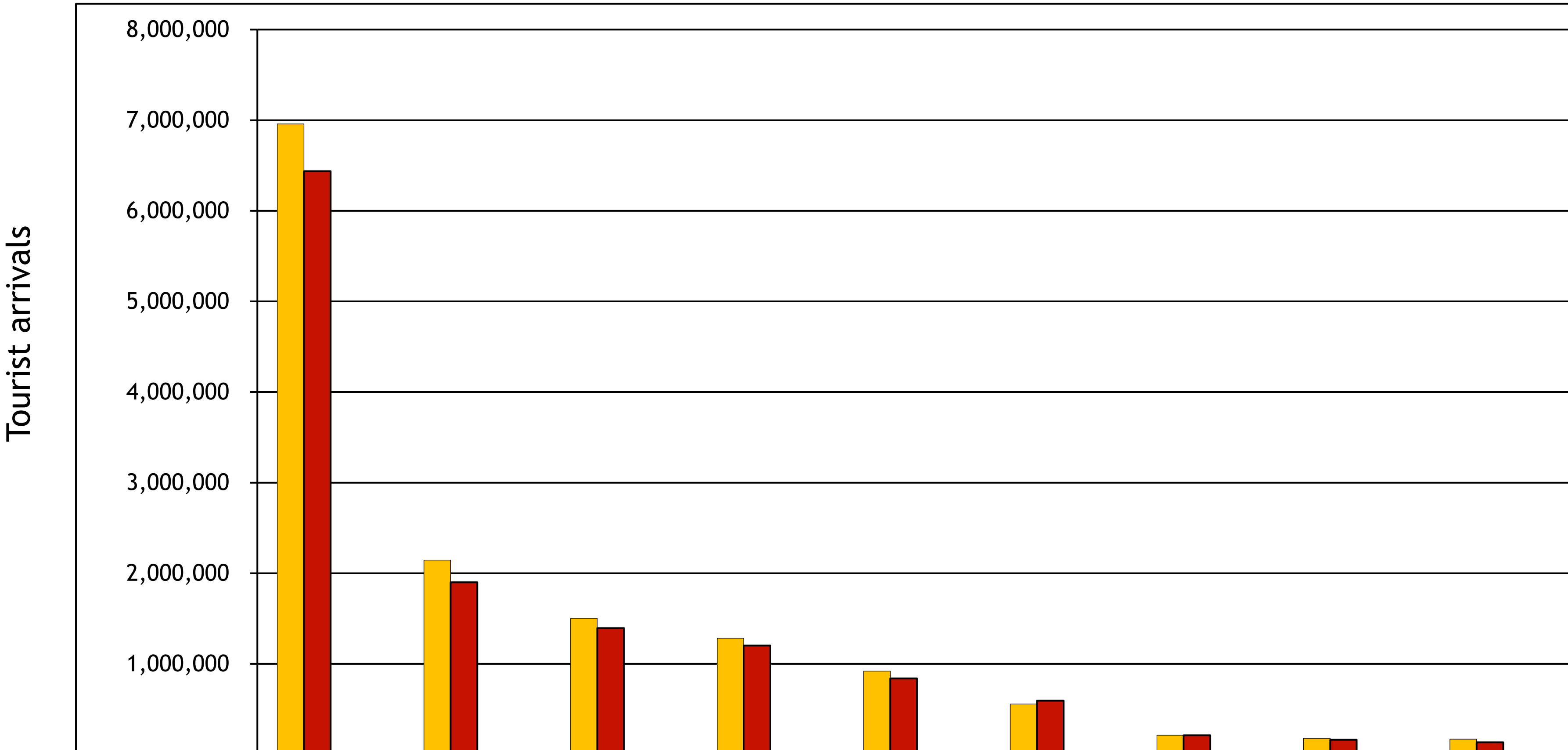


	Israel	Mauritius	Turkey	Egypt	Saudi Arabia	Seychelles	United Arab Emirates	Rwanda
2014	19,388	16,772	12,179	6,514	6,545	5,294	1,614	1,538
2015	19,244	17,020	12,398	7,210	6,933	6,253	1,979	933
Difference	-144	248	219	696	388	959	365	-605
% Change	-0.7%	1.5%	1.8%	10.7%	5.9%	18.1%	22.6%	-39.3%

Source: Stats SA Tourism & Migration release December 2015, SAT analysis

There was a 7.5% decline in tourist arrivals from Africa land markets, led by a strong decline from Zimbabwe. Botswana and Namibia were the only markets that recorded growth in 2015.

Tourist arrivals in South Africa from Africa land markets, Jan-Dec 2015



	Africa Land	Zimbabwe	Lesotho	Mozambique	Swaziland	Botswana	Namibia	Zambia	Malawi
2014	6,957,843	2,143,716	1,501,642	1,283,016	918,490	555,590	211,453	176,972	166,964
2015	6,436,592	1,900,791	1,394,913	1,200,335	838,006	593,514	212,514	161,259	135,260
Difference	-521,251	-242,925	-106,729	-82,681	-80,484	37,924	1,061	-15,713	-31,704
% Change	-7.5%	-11.3%	-7.1%	-6.4%	-8.8%	6.8%	0.5%	-8.9%	-19.0%

Note: Africa air markets are markets where at least 60% of arrivals in SA use air transport; Africa land markets are markets where at least 60% of arrivals in SA use road transport. Long-haul markets include all countries outside Africa
Source: Stats SA Tourism & Migration release December 2015, SAT analysis

Headline indicators for domestic tourism performance

Key Metrics		2013	2014	% change '13 vs '14	2015	% change '14 vs '15
Number of Trips	Annual	25.2 million	28.0 million	11.1%	24.5 million	-12.5%
	travellers	12.0 million	12.0 million	-	12.4 million	3.3%
	Average Trips Taken	2.1	2.3	9.5%	2.0	-13%
	By Purpose	VFR: 70% Holiday: 12% Business: 8%	VFR: 73% Holiday: 10% Business: 6%		VFR: 71% Holiday: 11% Business: 10%	
Spend	Total Annual Spend	R24.3 billion	R26.8 billion	10.3%	R23.6 billion	-11.9%
	By Purpose	VFR: 47% Holiday: 26% Business: 19%	VFR: 51% Holiday: 22% Business: 20%		VFR: 52% Holiday: 25% Business: 19%	
	Average Spend per Trip/per Day	R980/Trip	R950/Trip	-3.1%	R960/Trip	1.1%
		R210/Day	R230/Day	9.5%	R230/Day	-

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Annexure 3

TOURISM GRADING COUNCIL OF SOUTH AFRICA

Total Number of Graded Rooms
As at 31 March 2016

No.	Non-Hotel Accommodation	EC	FS	GP	KZN	LP	MP	NW	NC	WC	Grand Total
1	Backpacker & Hostelling	665	92	4,085	801	87	86	0	200	1,265	7,281
2	Bed & Breakfast	1,212	72	1,071	1,532	230	450	273	135	1,279	6,254
3	Caravan & Camping	707	334	50	1,025	1,426	1,161	420	188	1,476	6,787
4	Country House	311	55	275	223	172	138	42	18	787	2,021
5	Game Lodge	363	24	162	338	632	173	256	16	114	2,078
6	Guest House	2,399	711	3,879	1,769	931	1,615	941	585	4,247	17,077
7	Nature Reserve	0	5	0	13	0	0	0	11	59	88
8	Lodge	182	190	952	592	900	987	439	54	350	4,646
9	Self catering	991	406	839	1,862	1,598	1,417	794	237	3,864	12,008
	Non-Hotel Accommodation Total	6,830	1,889	11,313	8,155	5,976	6,027	3,165	1,444	13,441	58,240
10	Hotel Total	3,489	1,650	19,209	10,095	1,872	2,333	2,602	897	13,116	55,263
	Accommodation Grand Total	10,319	3,539	30,522	18,250	7,848	8,360	5,767	2,341	26,557	113,503
11	MESE Total (Business Tourism)	20	12	483	25	54	57	32	15	80	778
	Grand Total Graded Rooms	10,339	3,551	31,005	18,275	7,902	8,417	5,799	2,356	26,637	114,281

Of the 5,230 graded establishments, 131 are NEW applications that are still in progress

Total Number of Cancelled Establishments

Year-to-date as at 31 March 2016

No.	Non-Hotel Accommodation	EC	FS	GP	KZN	LP	MP	NW	NC	WC	Grand Total
1	Backpacker & Hostelling	3	1	2	0	0	0	1	1	9	17
2	Bed & Breakfast	51	10	47	35	4	16	17	6	77	263
3	Caravan & Camping	0	4	0	0	3	1	0	4	5	17
4	Country House	3	1	8	1	1	3	0	1	10	28
5	Game Lodge	1	1	1	3	9	0	0	1	1	17
6	Guest House	47	17	85	25	11	42	21	25	75	348
7	Nature Reserve	0	1	0	0	0	0	0	0	2	3
8	Lodge	2	4	10	6	12	6	6	5	4	55
9	Self catering	15	11	17	35	25	8	10	7	181	309
	Non-Hotel Accommodation Total	122	50	170	105	65	76	55	50	364	1,057
10	Hotel Total	15	4	46	15	4	4	4	3	27	122
	Accommodation Grand Total	137	54	216	120	69	80	59	53	391	1,179
11	MESE Total (Business Tourism)	4	3	13	0	3	5	4	3	3	38
	Grand Total Cancelled Establishments	141	57	229	120	72	85	63	56	394	1,217

Of the 5,230 graded establishments, 131 are NEW applications that are still in progress

Total Number of Cancelled Rooms
Year-to-date as at 31 March 2016

No.	Non-Hotel Accommodation	EC	FS	GP	KZN	LP	MP	NW	NC	WC	Grand Total
1	Backpacker & Hostelling	32	4	18	0	0	0	200	32	268	554
2	Bed & Breakfast	351	71	297	222	43	304	47	185	396	1,916
3	Caravan & Camping	0	179	0	0	157	4	40	0	179	559
4	Country House	9	2	72	4	34	24	4	0	90	239
5	Game Lodge	9	11	8	44	160	0	3	0	4	239
6	Guest House	504	181	978	288	99	562	249	214	488	3,563
7	Nature Reserve	0	16	0	0	0	0	0	0	20	36
8	Lodge	19	176	308	149	294	75	87	162	98	1,368
9	Self catering	89	138	141	197	178	63	43	52	524	1,425
	Non-Hotel Accommodation Total	1,013	778	1,822	904	965	1,032	673	645	2,067	9,899
10	Hotel Total	1,652	277	4,035	1,113	185	264	195	233	2,398	10,352
	Accommodation Grand Total	2,665	1,055	5,857	2,017	1,150	1,296	868	878	4,465	20,251
11	MESE Total (Business Tourism)	40	13	74	0	12	12	17	17	9	194
	Grand Total Cancelled Rooms	2,705	1,068	5,931	2,017	1,162	1,308	885	895	4,474	20,445

 Of the 5,230 graded establishments, 131 are NEW applications that are still in progress

Annexure 4

SOUTH AFRICAN NATIONAL CONVENTION BUREAU

SOUTH AFRICAN TOURISM

BIDDING SUMMARY

BIDS SECURED FOR SA: 2016-2022

Total Bids Secured	Total Number of Days	Estimated Delegate Numbers	Estimated Economic Impact
66	311	108 134	R1.4 billion

2016 21st International AIDS Conference
Durban, South Africa 17-22 July

ICEM
CAPE TOWN 2016
EM NOW: KNOWLEDGE, ACTION & ACCOUNTABILITY

GLOBAL
ENTREPRENEURSHIP
CONGRESS
JOHANNESBURG

World Confederation for Physical Therapy
CONGRESS 2017
Cape Town

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BID SUBMISSION ANALYSIS 2015-2016

BIDS PENDING 2016-2022

45 Bids Pending Outcome

112 000 Potential Delegates

216 Conference Days

Estimated Economic Impact: R1.5 billion

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THANK YOU

SOUTH AFRICAN TOURISM